

POSITION DUTY STATEMENT

PM-0924 (REV 7/2014)

CLASSIFICATION TITLE Research Analyst II	OFFICE/BRANCH/SECTION Division of Local Assistance/ Office of Resource Mgmt	
WORKING TITLE Statewide Reporting Coordinator	POSITION NUMBER 913-110-5731-004	EFFECTIVE DATE 07/01/2015

As a valued member of the Caltrans team, you make it possible for the Department to provide a safe, sustainable, integrated, and efficient transportation system to enhance California's economy and livability. Caltrans is a performance-driven, transparent, and accountable organization that values its people, resources and partners, and meets new challenges through leadership, innovation and teamwork.

GENERAL STATEMENT:

Under the general supervision of the Staff Services Manager I in the Division of Local Assistance (DLA) Office of Resource Management, Workload Standards, & Information Management Branch, the incumbent in this position is responsible for the conceptualization and development of highly complex reports and methodologies; conducting the necessary technical and statistical research, analysis, and compiling information which will assist with the management, coordination and analysis of information for projects and programs administered by the Division of Local Assistance (DLA), totaling over \$1 billion each year. The Research Analyst II is the statewide reporting subject matter expert and performs the more responsible, varied and complex duties associated with reporting.

The incumbent will work both in a multidisciplinary team setting and/or have primary responsibility for a project. In either setting, the staff person will be expected to work in consultation with various Caltrans staff, supervisors, and management. The quality of the services provided will directly influence the speed and accuracy of project delivery and the credibility of the DLA by providing transparency and accountability. Areas of analysis are likely to be lacking in precedent and/or limited availability of subject matter experts, where independent investigation will be required. The incumbent is computer literate and exhibits expertise with reports development, quality assurance practices, Excel spreadsheet functions, and navigation of and data extraction from complex data systems. The RA II may be called upon to act in the absence of his/her supervisor.

TYPICAL DUTIES:

Percentage Essential (E)/Marginal (M) ¹	Job Description
45% E	Act as the DLA's statewide reporting subject matter expert for eight different offices within DLA headquarters (HQ) and 12 District Offices. Gain a thorough knowledge and understanding of the DLA's existing business processes and data management systems with a focus on the DLA database, LP2000, and the Caltrans financial systems AMS Advantage and Enterprise Datalink. Independently employ the use of research methodologies and techniques to gather, analyze, and compile data needed to provide complex project and program reports analysis and projections. Conduct research and special studies of various DLA programs related to new and existing reports. Consults with and makes recommendations to Program Coordinators and management on proposed changes. Develop and implement changes and related quality assurance practices. Respond to data requests; gather and analyze data; develop and generate ad-hoc data reports using a variety of tools such as Oracle Discoverer, Access, FileMaker Pro, and Excel, including functions such as V-Lookup and pivot tables; generate and distribute routine weekly, monthly, quarterly, and annual reports.
25% E	Independently research, analyze, develop, and make recommendations to improve and implement the more varied and complex information management processes needed by the DLA. Areas of analysis are likely to be lacking in precedent and/or limited availability of a subject matter expert, where independent investigation will be required. Acts as a consultant to Program Coordinators and management in development of reporting processes, improve timely responses to request for information and data integrity, and identification of risks and accountability. Responsible for documenting processes and maintaining historical records.
20% E	Independently research, design, implement and maintain a reporting guide on reports developed; develop procedures on new reporting requests; provide training to Resource Management and HQ Program Coordinators on the use of developed reports using a multi-modal approach. Develop written correspondence, proposals, issue papers and reports.

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5%	M	Act as a project manager for special projects on crossover functions and activities that may require coordination with stakeholders within Caltrans and external agencies. Responsibilities may include independently developing a project plan and overseeing an implementation team and timeline.
5%	M	Assumes DLA Resource Management administrative duties such as, but not limited to, personnel issues, exams, business services, Workload Standards, and other other duties when necessary. May be called upon to act in the supervisors absence.

¹ESSENTIAL FUNCTIONS are the core duties of the position that cannot be reassigned.
MARGINAL FUNCTIONS are the minor tasks of the position that can be assigned to others.

SUPERVISION OR GUIDANCE EXERCISED OVER OTHERS

None

KNOWLEDGE, ABILITIES, AND ANALYTICAL REQUIREMENTS

The Research Analyst II must possess a thorough knowledge of Departmental organizational, administrative and project funding processes and have an understanding of relationships between various functions in Headquarters and districts as they impact the programs.

The incumbent must consistently practice the principles of Completed Staff Work, be able to effectively coordinate with various levels of management and staff, to communicate effectively both orally and in writing, build effective partnerships and alliances with internal and external stakeholders, and to build and maintain good cooperative working relationships within the team environment.

The incumbent must be computer literate and exhibit expertise with navigation of complex databases, Excel functions, and reports development; be able to reason logically to analyze data from numerous sources and present ideas, information and alternatives concisely and effectively; to collect develop, categorize, maintain and summarize information; and to write clear, concise correspondence, reports and technical analyses.

RESPONSIBILITY FOR DECISIONS AND CONSEQUENCES OF ERROR

The incumbent develops a wide variety of reports, and communicates with staff of a number of internal and external entities. If the information is not correct and timely, it can have major impacts on Program-wide management decisions and could adversely affect the Program's project delivery and the credibility of DLA.

PUBLIC AND INTERNAL CONTACTS

The position has substantial internal contact primarily with the Divisions of Information Technology, Budgets, Accounting, Transportation Programming, District DLAE's, and DLA HQ management and support staff. External contacts may include the FHWA, RTPA's, and associations such as the County Engineers Association and League of California Cities. External contact with control agencies will be made from time to time, as necessary.

PHYSICAL, MENTAL, AND EMOTIONAL REQUIREMENTS

The incumbent will be required to sit for long periods of time using a keyboard and video display terminal. The incumbent must have the ability to develop and maintain cooperative working relationships with others while gathering data and information for various reports. This may require responding appropriately to difficult questions and situations. Must have the ability to multi-task, adapt to changes in priorities, and complete tasks or projects with short notice.

WORK ENVIRONMENT

The incumbent will work in a climate-controlled office under artificial lighting. The incumbent will be required to sit for long periods of time using a keyboard and video display terminal.

I have read, understand and can perform the duties listed above. (If you believe you may require reasonable accommodation, please discuss this with your hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.)

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EMPLOYEE (Print)

EMPLOYEE (Signature)

DATE

I have discussed the duties with, and provided a copy of this duty statement to the employee named above.

SUPERVISOR (Print)

SUPERVISOR (Signature)

DATE